

# DOCUMENT RESUME

ED 216 225

CE 032 651

**TITLE** Conferences That Work. Leadership Pamphlet #11.  
**INSTITUTION** Adult Education Association of U.S.A., Washington, D.C.  
**PUB DATE** 56  
**NOTE** 52p.; For related documents see CE 032 641-656.  
**EDRS PRICE** MF01/PC03 Plus Postage.  
**DESCRIPTORS** \*Administration; \*Adult Education; \*Conferences; Job Skills; Leaders; Leadership; \*Leadership Training; \*Personnel Needs; \*Planning

## ABSTRACT

This pamphlet on conferences is the eleventh of 16 in a series to provide leaders in adult activities with sound introductory material to give practical help in using a method of adult education or working in a particular area. Its objective is to help leaders plan and manage conferences. Eight articles and how-tos are included. "The Conference of the Future" presents results of a sampling of 18 national organizations on ways to change and improve conferences. "Building the Conference Community" attempts to deal with the problems created by differences in experience among conference participants. Personnel requirements for conference planning are suggested in the "Conference Operations Chart" and "The Planning Committee." A detailed outline of the planning steps to be taken before, during, and after the conference is presented in "Planning and Management." "Organizing for Work" considers two fundamental processes of the work conferences--organization of small work groups and methods for establishing communication between these small groups and the entire conference body. "Rehearsal for Leadership" suggests how conference discussion leaders, recorders, observers, and resource persons may be trained. "Job Sheets" follow which may be duplicated and passed out to each person who is taking one of these roles. (YLB)

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ED216225

Leadership Pamphlet # 118

A practical aid to leaders in  
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welfare, health, farm,  
labor, religion, industry,  
and the community . . .

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## CONFERENCES THAT WORK

For all who plan and manage  
conferences. Details how to:

- involve delegates
- set up planning committees
- organize work groups
- train leadership

Adult Education Association of the U.S.A.

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**Leadership Pamphlets** are prepared and distributed by the Adult Education Association of the U.S.A. Each pamphlet provides leaders in adult activities with sound introductory material which can give practical help in using an important method of adult education or working in a particular area with insight and skill.

**Pamphlets in this series are:**

- P1 —How to Lead Discussions
- P2 —Planning Better Programs
- P3 —Taking Action in the Community
- P4 —Understanding How Groups Work
- P5 —How to Teach Adults
- P6 —How to Use Role Playing
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- P8 —Training Group Leaders
- P9 —Conducting Workshops and Institutes
- P10—Working with Volunteers
- P11—Conferences that Work
- P12—Getting and Keeping Members
- P13—Effective Public Relations
- P14—Better Boards and Committees
- P15—Streamlining Parliamentary Procedure
- P16—Training in Human Relations

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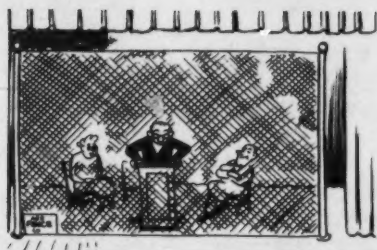
## CONFERENCES THAT WORK

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"Highly controversial subject tonight, eh?"



"During the forum you asked so many questions that no one could answer that we're appointing you research director."

# INTRODUCTION

Many of us—businessmen, housewives, county agents, Sunday school teachers, social workers, mechanics, adult educators—periodically pack suitcases and briefcases and take off for a conference. Almost all of us belong to organizations that send delegates to conferences. This pamphlet examines one important kind of conference—the kind that sometimes is called a work conference.

Here are some of the characteristics of the work conference. It requires intensive and long-range planning. This planning covers such things as preparing participants for the conference, developing programs, getting the participants involved in the work of the conference, and helping them use, back home, what they have learned.

Another characteristic of this kind of conference is that it consists of a series of sessions, usually involving a number of work groups, and lasts from a day and a half to a week or more.

The purpose of this kind of conference is to bring together a group of participants and a group of resource people to work together to develop new ideas and new plans and to share new information. Or to work together to learn new job performance skills, or new ways to prepare reports, or diagnose problems, or plan programs, or lead discussion groups.

The work conference may be like a convention in that it has after-dinner speakers, exhibits, general sessions, and high-priced banquets. It's different in that the goals go beyond giving inspiration and information, electing officers, and passing resolutions. The goal of the work conference is to secure the active participation of every delegate in working on problems, developing policies, and learning new ways of working. Its goal is change—not only to forward the progress of an institution or organization but to contribute to the participants' own growth and development.

Work conferences may be national affairs with hundreds of participants or small regional meetings. But regardless of who comes, or how many come, or how far they come, each participant brings part of his back-home

experience with him to the conference. There he must come to terms with the different back-home experiences of others. These differences in experience create problems for every conference participant and for the planners too, problems which "Building the Conference Community" attempts to deal with.

A good work conference doesn't just happen. It has to be planned with extreme care. The "Conference Operations Chart" and the chapter on "The Planning Committee" suggest the personnel requirements for conference planning. A detailed outline of the planning steps to be taken before, during, and after the conference is presented in "Planning and Management."

"Organizing for Work" takes up two fundamental processes of the work conference—the organization of small work groups, which are the core of a work conference, and methods for establishing communication between these small groups and the entire conference body.

One of the most crucial problems usually facing conference planners is to train those who will take important leadership roles in the conference work groups. "Rehearsal for Leadership" suggests how conference discussion leaders, recorders, observers, and resource persons may be trained. The "Job Sheets" which follow may be duplicated and passed out to each person who is taking one of these roles.

While this pamphlet is designed to be useful in itself, it is by no means exhaustive. Many aspects of conference planning are further developed in the materials listed on the inside back cover and in other pamphlets in the LEADERSHIP series (listed on the inside front cover). ◇◇

# THE CONFERENCE OF THE FUTURE

**W**HY all this talk about the conference of the FUTURE? Can it be that not all of us are wholly satisfied with things as they are?

Brother delegate, you said it! A sampling of eighteen national organizations—big ones, collectively involving untold man-hours of conference-attending (and perhaps more poignant bottom-hours of conference-sitting) reached overwhelming agreement: We have conferences; we love them; we mean to continue them; but we do hope to improve them.

My job is to sample the sampling and pass along some tidbits to you. The questions were sent out by ADULT LEADERSHIP and they drew careful, considered answers. The focus was on these three points: (1) Have you been changing in the pattern of your conferences, and why? (2) What new ideas have you tried out? (3) What is your picture of the "conference of the future?"

Out of all the words that filled the questionnaires, some main lines do appear. The use of the conference bringing together many people is increasing. Each year there seem to be more meetings and bigger meetings. We Americans, in fact, are becoming so addicted to confer-

ence-going that it is a bit dismaying to be told sometimes that each of us must make that final trip to the Judgment seat alone.

The number of people involved in most conferences creates special problems. How do we preserve the sense of personal contact and direct action that are so much easier to manage when the group is smaller? How do we make sure that our conference programs really meet the immediate, realistic concerns, the questions in the minds of the many people they seek to reach, both attenders and non-attenders. Very importantly—how do we give everyone who attends a chance to say something to the conference, to “get the load off his chest.” Such matters as these are part of that beckoning, evolving conference of the future.

### *Points of Departure*

Meanwhile, the pattern of the conference is already changing before our very eyes. Without exception the eighteen conference leaders who sent in the questionnaires testified that their organizations have been changing conference patterns in the last few years. Some of their reasons for making changes were pungent. The most frequently mentioned point was “they don’t participate when they do come.” Another high-ranking reason was “people are looking for more than just facts.” Several asserted with some asperity, “the right people don’t come.” And another frequent plaint was “people don’t arrive ready to take part.”

The good conference of today—the better conference of tomorrow—is switching over from a *listening* pattern to a *working* pattern. In the words of Mrs. Ann S. Friend, this is how the conferences of the American Hospital Association reflect the change: “Until 1946, the lecture was used almost exclusively, whereas now we use a combination of methods to fit the specific objective and subject. Emphasis is now placed on active participation for all group members. More visual aids are used to stimulate discussion, and leader training and orientation are carefully planned.”

E. C. Coffey, of the United Automobile Workers-CIO, mentioned among the current changes the use of

"buzz sessions following orientation in full assembly; plenary sessions then allow time for reports from each buzz group — role playing — quiz presentations — workshops." Another respondent spoke right out and said, "Formerly the conference participants were given a mass of material and conference time was devoted to approving or disapproving what had been presented. Now staff work

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***The editors thank the following leaders who  
filled out the questionnaire on which  
Mr. Carskadon based his article:***

***Miriam R. Ephraim***, Director of Program Section, National Jewish Welfare Board, New York City

***Sterling W. Brown***, General Director, National Conference of Christians and Jews, New York City

***Margaret G. Twyman***, Administrator, Association of the Junior Leagues of America, Inc., New York City

***Samuel Kaminsky***, Section Service Department, National Council of Jewish Women, Inc., New York City

***E. C. Coffey***, Assistant Director of Education, United Automobile Workers—Congress of Industrial Organizations, Detroit, Michigan

***Ann S. Friend***, Assistant to the Director, American Hospital Association, Chicago, Illinois

***W. Noel Hudson***, Executive Vice-President, Federation of Protestant Welfare Agencies, Inc., New York City

***Joe R. Hoffer***, Executive Secretary, National Conference of Social Work, New York City

***Guichard Parris***, Director of Promotion and Publicity, National Urban League, New York City

***J. E. Sproul***, Executive for Program and Research, National Board of Young Men's Christian Associations, New York City

***Anna Fillmore***, General Director, National League for Nursing, New York City

***Margaret Logan Clark***, Director, Leadership Services, Young Women's Christian Association of the USA, New York City

***Harry C. Eader***, Executive Secretary, Ohio Hospital Association, Columbus, Ohio

***Lyman S. Ford***, Associate Executive Director, Community Chests and Councils of America, Inc., New York City

***Winifred Fisher***, Executive Director, New York Adult Education Council, New York City

***Richard Beckhard***, Executive Director, Conference Counselors, New York City

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is devoted to getting out the basic problems, preparing resource materials and the final report. Recommendations and action plans are developed during the conference."

The indefatigable Winifred Fisher, of the New York Adult Education Council, said, "We tend to use discussion and other forms of group participation a good deal, and to work with smallish groups rather than mass events." It remained for Miss Anna Fillmore, of the National League for Nursing, to list "various adaptations of group dynamics, including methods outlined in NEA publications and by Michigan and Bethel, Maine, groups" as the changes being instituted in her organization. Lyman S. Ford, of the Community Chests and Councils of America, Inc., said, "We have been attempting to shift from gatherings primarily of the paid professionals to meetings in which volunteer board members and other leaders take a prominent, if not a leading, part."

Supremely, the thing that all of us strive for now—in preparation for that brighter and better future—is *participation, involvement, bringing each person into the main stream of the work of the conference.*

This simple principle embodies about three-quarters of what the current shouting is about. Means of accomplishing this central aim have been exhaustively studied in academic centers. Findings have been set forth, sometimes clearly, excitingly, with the tingle of fresh insight and human warmth—and sometimes with an overlay of some of the most portentous and lead-heavy jargon encountered since *Homo Sapiens* climbed down out of the trees and parlayed a system of agreed-upon grunts into communicable language.

### ***New Goals and Standards***

Words pass, but the goal endures. We do want participation, involvement, for they lie at the core of the whole democratic process. As applied specifically to conferences, this principle points to new techniques—the buzz session (one of my personal crotchets is that I abominate the phrase, but it is descriptive), the work group, the work-group reports in plenary sessions for general debate, the problem census, role playing and other devices.

But the dreams of the conference of the future envision more than new techniques. They call also for new



attitudes and new roles. No longer can we assemble our people, dump a program on them and let them go home. The new thinking stresses that a conference is not *an end in itself* but is a *device*, a means for accomplishing some larger aim.

Our all too human tendency is to pay too much attention to the conference itself; the truly hellish program and housekeeping details, the distraught struggles of the Name Tag and Paper Cups Committee, the flu epidemic at the last moment. All of us know why the harassed planners pray only that the meeting open as scheduled, go through its course and come to an end.

However, once we understand the concept of the conference as a working device, a means for solving problems and serving needs that preceded and will follow it, some of the other aspects of the conference begin to assume their proper place. We can see, for example, the need to provide not only people who are experts on the topics being considered, but also people who are skilled in the processes of organizing and running conferences. It behooves us to make use of persons who are skilled in training conference personnel, planning and organizing programs, leading discussions, reporting group meetings, etc., in such a way that the conference will be integrated with what comes before and after.

We can see that our thinking, planning and acting must begin long before the conference gets under way; must consider the needs of all people it concerns, not just those who can attend; and above all—must provide for a result—a growth in skill, an increase in enthusiasm, or a plan for an action or education program—that reaches

its full effect only after the conference is over, in the world beyond.

When it came to painting pictures of the conference of the future some of our respondents really let themselves go. Guichard Parris, of the National Urban League, says that he looks forward to "a conference so planned that it will bring about the reasonable and satisfactory participation of every person attending and will spur action by the group or the individual participant to achieve the specific purpose or purposes for which the group was called together." He's asking Santa Claus for the right things!

Joe R. Hoffer, of the National Conference of Social Work, says, "I think that we will be able to develop evaluative techniques for determining the effectiveness of our conference methods. We will make fuller use of continuing study groups in preparing for our conferences. We may be able to work out a better balance between large and small meetings so as to combine the values of both types for providing inspiration, information, learning and participation."

Perhaps the summary which illustrates the new thinking most completely was the one sent in by W. Noel Hudson, Executive Vice-President of the Federation of Protestant Welfare Agencies, Inc. Because it looks at the conference of the future from the point of view of the conference-goer, or consumer, it seems worth quoting in full.

"Your conference life will tend to fall into three parts: before, during and after. Here are some things that may happen:

#### *Before You Arrive*

"You will be involved in some of the pre-planning. Your organization will help to relate the conference program to the long-term goals of your organization. Your organization will recognize you as a liaison between it and the conference. It will see that you go carrying information and should come back laden with new ideas to share with them. Plans will be made to take advantage of this.

"More of the headachy details—registration, housing, etc.—will be taken care of. You will have a chance to get ready to participate by reading speeches, discussion outlines, etc., in advance. If you will be part of a work-

shop or discussion group, you will be alerted to the job ahead by the leadership. The planning organization will have used professional advice in evolving the plan of your conference.

### *When You Get There*

"You will find yourself welcomed, and if you are new to the group, an orientation session will make you feel quickly at home. You will meet lay members of your field as well as professionals. Surroundings will be pleasanter, taking advantage of outdoor settings, etc., and avoiding bare, schoolroom-like places. Chairs will be comfortable, with writing arms attached or tables nearby.

"Time will be recognized as one of the more precious things you bring with you, and you will have more freedom to use it. Planners will have made allowances for human nature to be human nature and will know that some of the "hashing over" done in gabfests is remembered better than the formal presentations of material. There will be less competition for every minute of your time and plenty of completely free periods for the casual meeting of informal fringe groups. On the other hand, you won't waste so much time. Meetings will begin and finish as scheduled. Speakers who run over will be unpopular. When discussion is promised it will be allowed for in the time schedule.

"Programming will bring you few speeches and more opportunity for participation. Meetings using new conference techniques will interest you more because they will draw you out. If the conference, or some of its workshops, are part of a series, you will be aware of the inter-relations.

### *After You Leave*

"You will be expected to share your experiences and your learning with the organizations to which you are responsible. You will participate in a follow-up plan that will evaluate the conference and supply you with the material that you helped to create there. The people you worked with at the conference will be available to you as resources for your home situation, and you in turn will be better able to help out in other situations.

"Greater cooperation among organizations in conducting conferences will mean less competition for the

ear of the public. Therefore you will reach a broader audience with the results of your conference through the mass media. Your agreements, not just your differences, will be newsworthy."

### ***Strictly Personal***

By strict interpretation I have finished my assignment. However, I have a priceless advantage, and as a case-hardened conference-goer, I mean to use it. I have the floor!!! So prepare yourself for a small clutch of personal idiosyncracies. In my private Santa Claus list for the conference of the future, I'd like to see:

1. *Documentation sent out in advance.* It is a little disconcerting to arrive at a conference and be handed a fat and prideful kit of materials when you haven't the faintest chance of being able to sit down and read and study them.

2. *Issues and solutions evolved in work sessions and open meetings.* It is a pretty clammy procedure just to be handed an already prepared statement for a "yea" or a "nay."

3. *More free time.* Conferees don't like to have every minute mortgaged to the official program. The business that takes place in casual groupings, in informal conversations and bull sessions in the lobbies and hotel rooms is often more important than the official sessions. Also, why not give the folks a chance to see the campus, the city, the surroundings of wherever the meeting is being held?

4. *Private rooms if possible.* In the resilience of one's undergraduate days it may seem jolly to double up, dormitory style, but by the time one is out of school a few years and is a venerable old wreck of—say—28 or even 33 or 34 or more, a room of one's own begins to seem highly desirable.

5. *An early and accurate list of attendees.* This simplest and most used of all convention tools is everlastingly hard to come by.

6. *Ballroom chairs that don't squeak and are upholstered in foam rubber.* Here, obviously, I delineate Utopia!

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## BUILDING THE CONFERENCE COMMUNITY

The person who attends a conference is both an emigrant and an immigrant. He emigrates for the time from the familiar continent of his work setting, his everyday organizational involvements, his home and neighborhood. He immigrates into an island culture deliberately set up with certain aims and objectives in mind. He comes under the influence, at least potentially, of people different from those with whom he ordinarily associates. He enters into relationships with people whose backhome reality differs from his own. He lives in a set of social arrangements, by a set of standards and mores, different at least in some respects from those to which he is accustomed. He travels into a new culture, designed to make him different at the end from the way he was when he came.

When we stop to think of it, this travel into a new culture is essential in providing opportunity for change and growth for the people attending the conference. But it does raise problems for the participant about how he is to handle the differences between the conference reality here and now and the home reality back there. The society of the conference needs to be different enough to challenge the customary ways and beliefs of the participants. It must not be so out of this world that participants can

build no bridges in thought and action between what takes place in the conference and what goes on back home.

Since being a member of two societies presents important problems of adjustment for the conference participant, it presents a problem also for those who assume responsibilities in setting up the conference. How can they help build the kind of conference community which supports each participant in solving his problems of dual membership constructively?

### ***Ways of Handling Dual Membership***

There are three typical ways in which the participant can handle the problem of his dual membership in a conference and a home community. How he handles the problem during the conference will have a lot to do with what he does with his conference experience, if anything, when he gets home.

The first way has already been suggested as the *tourist* reaction. The traveler, resisting involvement in the conference culture, strives to maintain psychological distance from the groups and people there who might influence him to change. His rejection may be motivated by fear that new ideas, new challenges might undermine the comfort and security of his position in his backhome environment. He may resent assuming the role of learner from others as being beneath the dignity of a person of his importance in the organization where he lives and works. Or he may distrust the conference leadership. Whatever the source of his motives to avoid full participation, he seeks in a variety of ways to minimize possible influences on his habitual ways of thinking, evaluating or acting. He may reject different ideas which others have as "theoretical" and "impractical." He may reject the methods of the conference as being unlike the ways things operate at home and so inapplicable there. He may overemphasize the uniqueness of his own situation and its demands which means, of course, that experience in or from other situations can't fit his own. And he may find reenforcement from cronies among the conference membership who feel like him that the conference

experience has little or nothing in it for them except as it reinforces their present ideas and practices and reassures them that they do not need to change.

The second type of reaction may be called the *expatriate* reaction. Far from rejecting the conference experience, the expatriate accepts it enthusiastically and uncritically. What he rejects, at least for the time, is his backhome situation and membership. Reality for him comes to be the conference. He is starry-eyed about conference ideas and methods. He deprecates the benighted ways of back home and vows publicly or privately or both to go back home and change thinking and practices there to the conference image. His motives, like those of the tourist, may be various. He may feel deeply dissatisfied with his position back home. And he may see the prestige of having been at the conference as a tool in improving that position. He may feel isolated at home and respond to the acceptance and comradeship he finds at the conference. The conference may tap his idealism in one way or another and develop the latent missionary in him. Whatever the motives, the results are easy to predict. The conference experience will probably lead to increased isolation of the expatriate when he gets back home. He may attempt to apply conference ideas and practices wholesale to the job situation or to the home organization. He increases resistance on the part of others who weren't at the conference and who resent attempted changes based on experiences which they haven't had. The participant, bruised by rebuffs from the home folks, may continue to rebel or may develop a cynical resignation toward the benightedness of those with whom he must work.

The adjustment which promises most intelligent carryover of conference outcomes to the world outside differs psychologically from both the tourist and the expatriate reactions. We might call it the reaction of the *learner*. He recognizes and accepts the fact of dual membership and of the discrepancies and conflicts between two sets of loyalties and demands. He accepts membership in the conference community, opens himself to influence

from others there. But he does not accept these influences uncritically. He tests conference ideas against backhome problems and situations. He relates relevant backhome experiences to the problems discussed at the conference. He faces realistically the problem of transferring and applying conference learnings and recommendations in the backhome culture to which he will return after the conference has disbanded.

### ***Supporting the Learner Reaction***

If the third pattern of adjustment promises more carryover of conference effects into the world outside, how can conference arrangements be designed to support this adjustment in the participants? How can whole-hearted participation in conference life be encouraged and at the same time responsibility for relating conference experiences to backhome realities be developed and maintained? These questions cannot be successfully answered by any one meeting or session of the conference, whether at the beginning or end. If they are to be well answered, they must be kept in mind at every stage of conference planning. In fact, finding answers includes pre-conference preparation and post-conference follow-up as well as what is done at the conference itself.

There are five principal things that can be done to induce conference participants to behave more like thoughtful learners and less like tourists or expatriates:

***(1) The conference can set a standard of active responsibility on the part of all participants for determining the goals of the conference and for working to make them come true.***

A conference planning committee should begin to work against the tourist reaction in its earliest pre-conference communications with participants. When the committee asks prospective participants by mail to list problems and themes for the conference or to react to and supplement a list which it has prepared, it is helping to establish this standard. It is saying in effect that every

member of the conference community is expected to contribute, that the emphases and goals of the conference are for all participants to determine, not just the planning committee.

When the planning committee asks participants to spend a good bit of conference time in groups small enough so that all can contribute to conference thinking and conclusions, it is reenforcing this standard.

Whether this standard of active, responsible membership in the conference gets meaning for the individual participant or not depends in part on what small group he decides he wants to work in. The briefing he is given about making this choice, whether by mail before the conference or at an early orientation session, should reflect this standard. Each participant is asked first of all to take the choice seriously, to think of his responsibilities to the conference in making this choice. He is asked to assess his own needs for learning in choosing his group. But he is asked also to choose a group in which he can make a contribution out of his own experience to the thinking and learning of others.

Finally, this standard of active, responsible membership is reenforced by suggesting to each participant that he make suitable preparation for the conference. His preparation may take the form of studying and thinking about the problem with which his conference group will deal, as it appears in his home setting. He may be asked to prepare by trying out his ideas about the problem on his home associates and getting their reactions to it. He may be asked to prepare by studying working papers which have been distributed before the conference or by doing other relevant reading. Whatever the form of the preparation, the implication is that membership in the conference means responsibilities to help make the conference as effective as possible.

*(2) The conference can accept a standard that all participants are responsible not only to themselves and to other conference members but to their associates in the home setting as well.*

If the first standard was designed to make it hard

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for any member to become a tourist, this standard is aimed to make it difficult for him to fall into the expatriate reaction. It means in effect that the learning and thinking he is doing at the conference is not an end in itself but a means of helping him to work with the home folks in dealing more effectively with their problems.

Here again, a planning committee can begin to set this standard in pre-conference communications to participants. When it asks for suggestions of problems and themes for the conference, it can encourage each participant to consult his colleagues before sending in his reply.

It can go one step behind this procedure and encourage organizations and agencies concerned to spend time in selecting the right participants to send to the conference. The organizations can be asked to use criteria of organizational need as well as individual need in selecting conference participants. Recognizing that carryover of conference learnings into the home situation is likely to be much greater where more than one local person attends the conference, the committee can encourage organizations to send and instruct teams of participants rather than individuals. It is true that rigid instructions to delegates as to what they are expected to bring home can operate to prevent them from entering wholeheartedly into what develops at the conference and learning from it. But it is equally true that if the home folks have no expectation that the delegates going to the conference will bring back help, the delegates are less likely to take the conference experience seriously. If they do, and if they come home with new attitudes, ideas or skills, they are likely to find themselves alienated from their backhome associates. Probably the answer for the planning committee is to encourage agencies and organizations to select and instruct teams of delegates but to suggest at the same time realistic criteria of selection and briefing. The committee can support the idea that the best things delegates can bring home are not answers to specific problems but new tools for diagnosing these problems and new ways of working toward solutions.

At the conference, participants can be discouraged from an uncritical acceptance of ideas, whether these ideas

come from resource people or from other participants. A premium can be put upon contributions directed toward testing and criticising proposals and reported experiences, provided these follow upon rather than precede an honest attempt to understand what the proposals mean. If a participant can test conference ideas in terms of their application to backhome realities, he will remain loyal to his backhome responsibilities as he participates in the community of the conference.

Finally, time can be left in the conference schedule for teams of delegates to meet from time to time to relate to backhome problems their conference experiences as these develop. There are advantages in having different members of a team from the same home base assigned to different work groups. But there are advantages also in having teams meet as teams during the conference to compare and interrelate different experiences. These meetings will make it harder for individuals to develop and maintain consistently either an expatriate or tourist attitude toward the conference.

*(3) The conference can prepare resource people to help keep conference deliberations geared to the backhome realities of participants.*

Resource people are always tempted to use their expertness and status to impress other participants with their unusual wisdom and competence. A parade of virtuosity, unrelated to the problems of participants, may impress and entertain them; it is unlikely to leave much deposit of learning or commitment which will make differences in the conduct of delegates when they once more face their home problems directly. Such use of resources, by burning bridges of perceived connection between conference reality and back home reality, may foster either tourist or expatriate reactions, depending on which reality is most attractive to the delegate.

The alternative is to prepare resource people (and materials too) to relate available sources of knowledge and experience from other settings to the backhome problems of the participants. The resource person is encouraged to act as a consultant to the delegates, either in a

work group or in individual interviews. His effort is not to peddle answers to difficulties and problems but to help participants see their problems more clearly, more comprehensively, more deeply than they did before.

Four conditions encourage this kind of resource use.

- 1) Resource people who are willing and able to work in consultant relations to delegates are selected.
- 2) Resource people are briefed on the purposes of the conference and the problems which delegates are bringing with them.
- 3) Delegates are told in an early session about the ways in which the resource people expect to be used.
- 4) Some directory of available resources is made available to participants so each can plan a schedule of consultation within conference limits of time and availability.

*(4) The conference can dramatize and clarify the problems of applying conference outcomes to the world outside.*

When any learner in one situation tries to apply what he has learned in another, he runs into problems. The delegate who makes a wholesale transfer of conference methods or recommendations to a backhome situation which is different from the conference in important respects is inviting a wholesale rejection of these methods and recommendations if they don't by accident work out well. He may reject them himself if they prove unsuccessful, and his colleagues in the home situation are almost certain to do so. On the other hand, if he overstresses differences between the conference situation and the back-home setting, while neglecting the features common to both, he may make it hard for himself or others to try any transfer of conference outcomes at all.

At some conferences a general session is devoted specifically to the problem of applying principles and recommendations. Individuals or teams may report on post-conference plans. Experts or delegates or both may then make a clinical critique of these plans. Or delegates may be asked to act out their projected first step after getting home, whether this step is reporting to the boss, discussing the conference at a staff meeting, or trying out some new technique in the job setting. The other participants can then discuss what has been acted out and can

clarify and face the problems involved in moving back home from their week-end spree on the conference island.

***(5) The conference can discourage emphasis on irrelevant outside ranks or positions and can encourage the development of a status system in the conference which supports rather than thwarts conference objectives.***

All of us have seen work groups and conferences hampered and inhibited by carrying over of big shot-little shot, boss-employee, teacher-pupil relationships from the outside world into the conference society. The big shots may occupy most of the time of the work groups by talking, whether their ideas merit the time or not. The little shots may hesitate to challenge the big shots, either their ideas or their monopolization of time, even though the little shots may have insights, ideas and experience more relevant to the problems being discussed, better thought through and expressed too, than those of which the big shots are capable. Similarly, the employee hesitates to challenge the boss, and the pupil the teacher, even when the learning and growth of the group or of the individual requires the challenge.

One way in which the problem can be handled has many limitations. Put the big shots in one work group, the little shots in another. But this kind of grouping usually doesn't follow the patterns of grouping which either individual need or the needs of organizations represented would suggest. The more rational bases of grouping normally demand that people of different social statuses in the outside world work and think together.

There is, of course only one fundamental way of handling the problem. This way is to develop a standard, in the conference community and in its constituent groups, that contributions are to be evaluated and rewarded not on the basis of who made them but on the basis of how well they contribute to the clarification and solution of the problems being discussed. Where this standard prevails, Instructor A can talk up to Dean B when he feels the Dean's ideas are irrelevant or otherwise faulty, without fear and with approval from others as well as the Dean. Or Housewife X can show the inapplicability of Family

Expert Y's ideas, with general rejoicing all around.

It is no easy task for a group or a conference community to develop such a standard of behavior. The planning committee or the group leader can't legislate it. It must grow out of the attitudes and expectations of the members if it is to be effective. But the planning committee and designated leaders can help to build such a standard at points where irrelevant outside statuses are most likely to be smuggled in. What are some of these most common points of illegal entry where the conference community needs to be fortified?

One point is the use of names and titles in the conference. The title "Doctor Zilch" on a name tag (or in his self-introduction to his group or remarks to him or about him by a chairman) may release attitudes of awe and self-censorship in "Mrs. Mouseman," another group member, which render her quite incapable of free interaction with Dr. Zilch and his ideas. And Dr. Zilch may have a self-image of *Malatma Zilch* so reinforced by public recognition of his academic burden that he finds it hard to do anything but pontificate in the group. Names without titles on the name tags worn by participants may help to discourage the parading of titles as status labels. Sometimes, in conferences where the practice does not seem an affectation to the members, the use of first names is encouraged, following the long-established practice of the Society of Friends, who have tried in this way to keep unmerited status out of their association.

In addition to titles, self-introductions in small work groups offer a temptation to the status-conscious. Early in the conference, when participants don't know where they stand in relation to others, there are pressures on every delegate to use self-introduction as an opportunity to build himself up with his new and unknown associates. He may do this by telling of all his important offices and experiences, whether they are relevant to the group task or not. There is nothing inherently wrong with a person's building himself up when he needs a build-up. But such extraneous material adds little knowledge or experience to the progress of group discussion. And it may provoke unproductive competition among group members.

Some work group leaders try to meet this problem by suggesting simple introductions in the opening session of the group—perhaps name, work, and home location. Sometimes they discourage initial introductions completely, feeling that the best way for people to get acquainted with each other is for them to start working on problems of common concern.

There is often an advantage in a group's knowing what the areas of special competence of its members are so that the group will know where to turn when special resources are needed. When this is true, the aim is to get clear, self-objective statements from the members, limited to information which seems at the time to be useful to the group. The same rule applies to introductions of special resource people or of speakers in large sessions or in a small work group. The status established by such introductions is functional in furthering the work of the conference.

As conference planners examine established conference arrangements and rituals, they may discover supports to status relations which thwart rather than serve the objectives of a democratic conference community. Does the conference staff have different and better housing than the participants? Is there a reason for these distinctions? Are staff and resource people segregated from delegates at meals or during social occasions? If so, why? Do people with no functions in the program sit on the stage at general sessions? What effects does this have on conference attitudes? Such questions must be faced and answered by a planning committee which seeks to exclude irrelevant status from the conference community.

Like all educational arrangements, a conference builds a temporary association designed to produce changes in people who become members of it. It encounters a danger common to all educational arrangements—the danger of isolation from the realities of the surrounding society which ideally it is designed to alter and improve. Life in an educational community, in this case the conference, always raises for the learner problems of adjustment to dual group memberships. The task for conference planners is to design supports to healthy rather than unproductive solutions to these problems. ◇ ◇

# CONFERENCE OPERATIONS CHART

**Policy Group of Sponsoring Organization**  
(Executive Committee, Delegate Assembly)

**Conference Planning Committee**  
Chairman, this committee—Conference Chairman

**Conference Chairman and Conference Steering Committee**

**Program Coordinator**

**Conference Manager**

**Chairman,  
Communications  
Committee**

**Chairman,  
Evaluations  
Committee**

**Exhibits  
Committee  
or Coordinator**

**Training  
Coordinator**

**Public Relations  
Committee or  
Coordinator**

**Administrative  
Services**

**Local  
Arrangements  
Committee or  
Coordinator**

Design fact-finding and evaluation devices  
Train interviewers and observers as needed  
Arrange liaison with work group observers  
Tabulate and interpret evaluation data  
Recommend to steering committee, policy group and future planning committee improvements in conference policy and pattern

Plan and administer exhibits  
Assign space  
Arrange liaison with outside exhibitors  
Staff and maintain internal exhibits  
Arrange display and library booths

Set up press room  
Arrange for press conferences with newspapers, radio, TV  
Prepare news releases and special features if needed  
Facilitate photographic and TV shooting if authorized  
Entertain special conference guests

Set up and run business office  
Recruit and organize stenographic pool as needed  
Set up and administer pool of audio-visual aids and materials  
Arrange for duplication, collating and distribution of on-the-spot reports and documents for work groups, general sessions, evaluations, communications, etc.  
Supervise custodial services  
Arrange for and schedule technical help for audio-visual operation, etc. for work groups and general sessions

**General Sessions  
Committee**

**Small Work Group  
Committee**

Plan reports of conference findings and experience during and following conference  
Collect materials for reports in collaboration with work group recorders, speakers, panels, general sessions committee, etc.  
Plan report of conference progress for general sessions and conference newsletter, if used  
Plan and prepare take-home materials, conference proceedings and other publications

Select and brief speakers, panels, demonstrators, etc.  
Plan and rehearse all of the general sessions  
Maintain liaison, as necessary, with administrative services, evaluations and communications

Select and recruit the group leadership personnel—discussion leaders, recorders, resource persons, observers  
Arrange for pre-conference preparation of leadership personnel  
Orient whole conference to work-group plans  
Conduct during-conference training of leadership personnel  
Maintain liaison with administrative services, general sessions, communications and evaluations

**Conference Services to Delegates**  
Staff and administer conference registration  
Set up and staff Information Bureau  
Set up and staff Travel and Transportation Service  
Recruit and train guides, ushers, pages, conference host and hostesses  
Set up bulletin board and lost-and-found services  
Set up services for theatre tickets, conducted tours, etc., if appropriate

**Hospitality**  
Arrange delegate and conference housing  
Arrange for conference entertainment and social occasions  
Arrange for greeting and reception of delegates and other conference members

This chart is designed to show both the committee structure and the functions and services which need to be planned for in a conference or workshop. Not all of the functions are necessary in every conference. One person or committee may perform a number of functions and services.

# THE PLANNING COMMITTEE

**N**OT all conferences or workshops call for infinitely detailed planning. Some are planned by one or two staff people or a few volunteer leaders. Workshops and institutes, particularly, may be managed reasonably well under the direction of a small number of staff planners. The materials appearing in this pamphlet, however, are presented on the assumption that the kind of conference we are talking about will need a conference planning committee to carry out the objectives of the organization in such matters as getting a considerable amount of delegate involvement and participation and assuring reasonable follow-up in the backhome situation.

## *Selecting the Conference Chairman*

It is important that whoever has the responsibility of making appointments—whether the president of the organization, the board of directors, or the executive committee—should find for the conference chairman someone who is willing to share as widely as possible the tasks of planning and who will become a leader in getting the widespread participation necessary to make a good conference plan. Concretely his duties involve the following sorts of tasks:

1. Getting the right kind of planning committee around him and serving as discussion leader for that committee;
2. Supervising the ways in which delegates are involved in the planning;
3. Acting as liaison between the conference planning committee and the policy-making group;

4. Anticipating the problems that might come up in the conference and seeing that qualified people are on hand to take care of these problems;
5. Anticipating management problems and seeing that a steering committee or conference management committee is set up to meet these problems;
6. Acting as a resource person to the conference steering committee, interpreting to it the aims and intentions of the conference;
7. Acting as a resource person to the evaluation committee, helping it to spot the rough places as well as the smooth spots in the conference plan as information to be passed on to future planning committees;
8. Doing trouble shooting as needed.

In order to be a good organizer and administrator, the conference chairman should be the kind of leader who knows how to get information, how to motivate, how to work with people, how to evaluate effectiveness, how to be of service to all of the many people with whom he associates, and how to involve others in making plans and decisions.

### ***Who's Who on the Planning Committee***

The members of the conference planning committee may be appointed by the policy group or by the conference chairman. If the chairman makes the appointments, he will want to get help and advice from other people; and no matter who makes the appointments, the committee as a whole needs to have within its make-up people who represent three dimensions of organizational and conference need. These dimensions, covering the different interests or stakes that people have within the organization, their abilities and skills in conference planning and management, and their habits and attitudes regarding conferences, can be spelled out in some detail as follows:

1. **Different interests or stakes in the organization—**  
In an educational conference, for instance, where teachers and administrators are both involved, the planning com-

mittee should have representatives from both groups as members. In a labor union conference where there is to be representation from the different locals, each local needs to have a representative on the planning committee. In a sales conference the delegates might come from different geographical areas or represent different product divisions.

**2. Abilities and skills in planning and management—**

People who plan a conference need know-how in evaluation, large-meeting techniques, leadership preparation, information collecting, recruiting, staff training, fact-finding on members' problems, publicity and promotion, using resources, and a variety of other skills. Although it would be unrealistic to expect any one member of the conference planning committee to be a specialist in all of these, the members of the committee should include people who do know something about as many of them as possible. If the committee members lack certain skills or abilities that are necessary, the committee can invite conference consultants from outside the group to meet with them from time to time.

**3. Habits and attitudes regarding conferences—**

One person who thinks conferences are usually a bore and a waste of time could in certain ways be a positive addition to any planning committee. If he were sincere in his opinions and said what he thought, the chances are that his colleagues would give far better thought to their responsibilities than they would otherwise. By and large, however, members of the committee should have favorable attitudes toward growth, change, and democratic concepts if the conference policy of the organization stresses these. The members need to be individuals who are secure and self-confident enough to find excitement and satisfaction in trying something new and adventurous if their planning calls for it.

If a different person were needed to meet each of these various needs, the number of people required on a conference planning committee would quickly mount to a sizable number. Fortunately many people are available who have abilities of varied kinds. If the dimensions of need just identified are kept in mind by whoever makes the selection of the planning committee members, then some reasonably accurate visualization of the potentialities of each member will develop; a sense of the ability of one committee member to perform different functions at different times and in different ways is likely to evolve; and any needs that cannot be filled by committee members can be identified and provision made for getting outside assistance in the form of consultants. ◇ ◇

# PLANNING AND MANAGEMENT

**D**ELEGATES are likely to work harder and to assume more responsibility for the aims of a conference if they have a part in planning it. Ideally, perhaps, every delegate to a conference should share in conference planning. There certainly should be early and carefully thought-out methods of determining what the delegates expect from a conference and what they hope to take home with them as a result of attending, as well as means for them to share in whatever planning develops from day to day during the conference sessions.

Conference planners, to build a successful program, need to understand clearly why the conference is being held at the specified time and what its relationship is to the ongoing program of the sponsoring organization. They need also to start planning early enough, get the right kind of help at the right time, and channel the interests and abilities of prospective participants into conference planning and management.

The detailed outline that follows gives an idea of the planning and management steps required in a work conference. The outline is not constructed on the premise that a paid, full-time staff is available to carry out the burden of the work. It is constructed in such a way that a volunteer committee without paid staff should be able to work from it.

## BEFORE THE CONFERENCE

### A. Getting Set

*(Steps 1 and 2 precede the first meeting of the conference Planning Committee.)*

*Personnel  
or Committees  
Involved*

- |                                                                                                                                                                                      |                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| 1. Receive commission (including budget) from over-all policy authority and secure any necessary clarification of conference policy.                                                 | <i>Conference Chairman</i> |
| 2. Establish working communication with paid staff (if any), policy officials, and chairmen of "last year's" and of "next year's" conference; appoint Conference Planning Committee. | <i>Conference Chairman</i> |

### ***B. Squaring Away*** *(First meeting of Planning Committee)*

- |                                                                                                                                |                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| 3. Report information gathered from steps 1 and 2.                                                                             | <i>Conference Chairman</i>                                       |
| 4. Review any evaluation data available from prior conferences.                                                                | <i>Planning Committee and Chairman of Local Arrangements</i>     |
| 5. Arrive at committee agreement on exact purpose and kind of conference, institute, workshop, etc.                            | <i>Planning Committee</i>                                        |
| 6. Select place and set calendar dates (if not already made by some other group) and assign follow-up responsibility.          | <i>Planning Committee and Chairman of Local Arrangements</i>     |
| 7. Establish policies on promotion and publicity. (Designate services available, groups to be reached, budget available, etc.) | <i>Appoint Chairman of Public Relations Committee</i>            |
| 8. Decide policy on exhibits as they relate to purpose of conference and objectives of organization.                           | <i>Appoint Chairman of Exhibits Committee for follow through</i> |

### ***C. Setting Goals*** *(Second meeting)*

- |                                                                                                     |                                                                                  |
|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| 9. List changes or outcomes expected to happen as result of conference.                             | <i>Steps 9 to 17 are the responsibility of the Conference Planning Committee</i> |
| 10. Decide on scope of attendance: "open to one and all" or restricted to selected invitation list. |                                                                                  |
| 11. If "selected group," establish criteria for extending invitations.                              |                                                                                  |
| 12. Decide if conference should have theme. If so, select tentative, working theme.                 |                                                                                  |
| 13. Plan procedures (interviews, questionnaires, etc.) which will involve participants in defining  |                                                                                  |

subject-matter boundaries, goals, and methods.

14. Set up required subcommittees for conference planning functions (See Conference Operations Chart). Select Program Coordinator, chairmen of large group meetings and small group meetings and invite them to the next session of the Conference Planning Committee.

#### **D. Defining Content**

*(Third meeting of Conference Planning Committee)*

15. Review information received from potential participants (see step 11, above) on needs, interests, suggested emphasis, etc.
16. Determine actual content to be covered. If necessary, develop alternative patterns and set priorities.
17. Decide which content can best be covered in large meetings (general sessions) and which in small, face-to-face groups.
18. Survey methods most appropriate to meet the objectives of general meetings and of small group meetings.

*Program Coordinator,  
Chairman of General  
Sessions Committee,  
Chairman of Small  
Group Sessions  
Committee*

#### **E. Widening Involvement**

19. Select additional committee chairmen now required; invite them to next meeting of Conference Planning Committee.
20. Plan procedures for referring decisions made at this meeting to all delegates expected to attend. This includes testing the theme, requesting suggestions on resource personnel, and securing tentative choices for preferred attendance in small meetings.

*Conference Planning  
Committee*

*Follow-up action by  
Program Coordinator  
and Staff*

#### **F. Local Arrangements**

*(Part I)*

21. Receive report on facilities and services from chairman of Local Arrangements Committee.

*Planning Committee*

- |                                                                                                                                                                              |                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| 22. Set policies on registration (will there be pre-registration, policy on payment of fees, will members and non-members pay the same fee, etc.)                            | <i>Appoint Chairman of Registration Committee</i> |
| 23. Set policies and define general outline of recreational activities, social affairs, and extra-curricular events in relation to program plans (tours, free evening, etc.) | <i>Appoint Chairman of Hospitality Committee</i>  |
| 24. Set policies on meals (banquets, luncheons, time limits, etc.)                                                                                                           | <i>Chairman of Local Arrangements</i>             |

### **G. Program Determination**

*(Fourth meeting—joined by all committee chairmen appointed thus far)*

- |                                                                                                                                                                                                     |                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 25. Program Coordinator reports on information received from potential delegates (see step 20 above).                                                                                               | <i>Program Coordinator, Coordinator of General Sessions, and Coordinator of Small Group Sessions particularly involved in steps 25 to 32</i> |
| 26. Develop final program.                                                                                                                                                                          |                                                                                                                                              |
| 27. State theme in final form.                                                                                                                                                                      |                                                                                                                                              |
| 28. Determine exact purpose, size and composition of small work groups.                                                                                                                             |                                                                                                                                              |
| 29. Established specific purpose, method of treatment and resources needed for each general session or large group meeting.                                                                         |                                                                                                                                              |
| 30. Identify kinds of material required for program section of the conference (background papers, bibliographies, kits of publications, planning outlines, etc.).                                   |                                                                                                                                              |
| 31. Select resource personnel required (speakers, discussion leaders, etc.). List at least three possibilities for each program need in anticipation of invitations not accepted, withdrawals, etc. |                                                                                                                                              |
| 32. Plan briefing for each resource person on exact task to be performed.                                                                                                                           |                                                                                                                                              |
| 33. Indicate broad outlines of leadership training—for discussion leaders, recorders, resource persons and others—required to meet specific goals of the conference.                                | <i>Appoint Training Coordinator</i>                                                                                                          |
| 34. Determine what records need to be kept by each conference unit. (Proceedings, reports from work                                                                                                 | <i>Appoint Chairman, Communications Committee</i>                                                                                            |

groups, texts of speeches, study materials, etc.) State policy to aid in distinguishing between materials duplicated for distribution during the conference and those to be duplicated and distributed after the conference. Test policy against budgetary authorizations.

35. Establish policies on level, range and extent of conference evaluation.

*Appoint Chairman of Evaluation Committee for follow through*

## **H. Local Arrangements** **(Part II)**

36. Indicate supplies and equipment required (including visual aids).
37. Describe and list secretarial services expected.
38. Appoint Conference Steering Committee as a subgroup of Conference Planning Committee.

*Conference Manager*

*Chairman of Local Arrangements, Program Coordinator, and Conference Manager*  
*Conference Chairman*

## **I. Pre-Conference Steering**

39. Receive reports from chairmen of various program and arrangements committees.
40. Supervise sending out pre-conference program, advance registration, distribution of background papers, etc.
41. Report periodically to policy group.
42. Activate Conference Steering Committee.

*Program Coordinator and Conference Manager*

*Program Coordinator and Conference Manager*

*Conference Chairman*

*Conference Manager*

## **J. Pre-Conference Preparation**

43. First meeting of Conference Steering Committee.
44. Job training of Conference Manager's staff (see Conference Operations Chart) in their management tasks (registration, hospitality, administrative services, press relations, etc.).
45. Leadership training of resources personnel.
46. Rehearsal of opening session.

*Conference Manager*

*Conference Manager*

*Training Coordinator*

*General Sessions Coordinator*

## DURING THE CONFERENCE

- |                                                                                                                                                                         |                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| 1. Periodic meetings of Steering Committee to re-plan as necessary, receive information from Communications and Evaluation Committees, make emergency policy decisions. | <i>Steering Committee</i>                |
| 2. Rehearsal or detailed planning review of all general sessions.                                                                                                       | <i>General Sessions Coordinator</i>      |
| 3. Meetings of conference leaders and resource personnel as required.                                                                                                   | <i>Training Coordinator</i>              |
| 4. Meetings of recorders to plan reports from parts of conference to the whole and to prepare post-conference reports and other publications.                           | <i>Communications Committee Chairman</i> |
| 5. Meetings of Evaluation Committee to analyze data collected during the conference and prepare reports to conference delegates.                                        | <i>Chairman of Evaluation Committee</i>  |

## AFTER THE CONFERENCE

- |                                                                                                                                                                                                                                                                                    |                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|
| 1. Hold joint meeting of representatives of this year's and next's Planning Committees with policy group to analyze this year's planning in terms of achievement and to review implications of evaluation data for future conferences and general development of the organization. | <i>Chairman of "Next Year's" Planning Committee</i>          |
| 2. Make final decision on reporting conference findings to those who attended as well as to those who did not attend.                                                                                                                                                              | <i>Chairman of Communications Committee</i>                  |
| 3. Make conference reports to delegates with findings, implications, plans for follow-up activities, preliminary commitments on next conference.                                                                                                                                   | <i>Chairman of Communications Committee</i>                  |
| 4. Prepare final financial report and inventory of supplies. Provide for return and any necessary servicing of equipment and permanent exhibit materials.                                                                                                                          | <i>Conference Manager and appropriate committee chairmen</i> |
| 5. Prepare operations report from beginning of planning for guidance of future conference committees.                                                                                                                                                                              | <i>Chairmen of Planning and Steering Committees</i>          |

## ***Reporting the Conference***

Since those who plan a conference and see it through expect it to effect changes distant in both time and place, they are likely to give a fair amount of attention to the business of reports and reporting. One of the problems of reporting a conference is getting recorders in the various work groups to prepare reports that convey the essential information without going into an unnecessary amount of detail, and that follow the same structure so that the reports from the various groups can be brought together into one summary report. One way of structuring the reports is to provide the recorders with a standardized report form. Here is an example of such a form. When the form is actually used, a suitable amount of space should be left after the numbered statements so that the recorders can fill in their comments.

### **WHAT ARE WE DOING?**

*(Recorder's Report of Meeting)*

Name of Group.....

Session I, Session II (circle one)

Name of Group Leader.....

Name of Recorder.....

Mailing Address of Recorder.....

1. List group's agenda  
(Check those agenda items actually discussed)
2. Main issues or problems brought out
3. Main differences of opinion among group members
4. General conclusions agreed upon
5. Specific recommendations made and to whom they were made
6. Other information

## ORGANIZING FOR WORK

**A** CONFERENCE used to be compounded of two mildly antagonistic parts. One part sat stiffly on the platform seats and looked down. The other part fidgeted in the auditorium seats and looked hopefully up. The part on the platform waved its arms, drank water which it personally poured from a pitcher into a glass—and made speeches on what it thought the other part wanted to hear. Or ought to hear. The part down there being harangued was alternately amused, interested, bored.

After a meeting or two, more and more of the audience-part came late, left in the middle, chatted in the corridors, went out to do the town, or got mad and said, "Never again."

Today this platform-dominated conference is yielding to one which more adequately meets the requirements for individual and group achievement. Today's audience is no inert mass. It has its dynamic place in the over-all meeting design—a functioning unity with the planning staff and platform personnel.

This is true whether the primary aim of the conference is for each member to gain some needed information, or whether the primary aim is for the conference as a whole to take some action such as making decisions or producing a report.

How is this effective audience participation achieved?

By coming to grips with these two organizational problems common to all modern work conferences:

- (a) setting up work groups
- (b) planning for communication between the several parts of the conference.

### ***First: Setting up Work Groups.***

Members of work conferences today spend more time in small groups than they do in the large assemblies. It is easy to see why. The group is the living core of the thing. It might almost be called the atom in the structure.

Every member of the conference can take an active part in a small work group, contributing his thinking and experience to the whole.

When we try to cope with major problems, such as deciding policy, we quickly realize that we can do a thorough job only if we divide the work so some conference members can do one part and some another.

In general, the shorter the work conference, the greater the need for a fairly rigid assignment of people to get the work done. When the conference lasts several days and there is freedom for last-minute choice, then in addition to the work groups, there may be injected simultaneous sessions complete in themselves, such as demonstrations of methods, films, technical information, and the like.

The trend toward pre-conference correspondence between planning staff and participants gives the planners essential information about the people who are going to come to the meetings, and some of the groupings may well be arranged in advance of the conference. But not all groups in a policy-making type of conference should be formed in advance. This is because members may have strong personal interests which would not be revealed by pre-conference correspondence, and which would be violated by arbitrary assignment.

Unforeseen problems are bound to arise during a meeting. Some policy which appeared in advance to be but a small facet for subgroup solution may suddenly become such a burning question that everyone wants in on the act. In this case a general meeting may be in order before any small group can be given authority to deal in any way with the problem.

Now, let's examine "grouping" in the light of the type of conference where new information for the individual is the primary goal.

We often hear the criticism that discussion groups in annual conferences start at the same place each year and cover or uncover the same ground. Some thought to grouping by levels of experience and sophistication will help alleviate this condition, although a common denominator of interests might be considered elemental in forming the small work groups. Perhaps it's a professional interest (they're all librarians, doctors, ministers . . .). A common function within different organizations (sales-

men, office managers, file clerks . . .) might form the basis for the breakdowns. Or perhaps volunteer workers see themselves as having problems different from those of the professionals.

Within such areas there will also be a wide gap in knowledge and experience, some people needing elementary help, others wanting the refreshment of new ideas and the opportunity to consider the application of recent research findings—be they in medicine, human relations, or whatnot.

Again there arises the question of when these divisions are to be made.

Where new information is the conference aim it will usually be desirable if people sign up for particular learning groups *before the conference opens*. Pre-conference correspondence tells prospective members what kinds of information and service will be available. In turn, the planning committee finds out about member interests, professional orientation, and to some degree the contributions that can be made.

When groups are set up before the conference, the committee can make practical arrangements for appropriate meetings rooms, plan to have research material and other resources available, make sure that consultants will be on hand, etc. In addition, if participants are committed to particular learning groups ahead of time, they are likely to have a stronger sense of belonging, and to want to stay with the work group of their choice.

The details throughout are less important than the principle that at a work conference groups are set up in whatever ways the members can work on their problems most effectively.

### ***Second: Planning for communication***

A conference is a working-together experience. Plans must be changed from day to day or from group meeting to group meeting as new needs arise. To cope with this inevitable fluidity, some kind of conference communication system is needed. At the orientation meeting the way the staff, the planning committee, the group teams and group members fit into the functioning whole can be explained.

Before the meetings have begun, a list of resource persons and information as to the kind of help each can

provide may be prepared. A flyer or newspaper can summarize conference activities and provide pertinent information as to meeting places, etc. And as soon as registration is completed, a roster of the entire conference membership can be made available.

As the conference gathers headway, short general sessions, interposed between group meetings, provide for some feedback to the general body. By this means participants can keep up with all group activities, and the separate groups can sharpen this focus on the common goal. These general sessions may be called whenever they are needed—perhaps the first thing in the morning, just before or after lunch, or at the close of the day.

The service team for each group includes the leader, recorder and observer. This service team meets informally at lunch, dinner, or in any quiet—or sometimes necessarily unquiet!—corner to discuss problems arising in the group, and perhaps to determine how, as a team, it can increase its efficiency in aiding the group process. The team, too, may seek out a staff member or a resource expert for informal help, or it may want to arrange for special aids for the next group meeting: a blackboard, a film, resource material.

The recorder for each group will have an important role at general sessions. As spokesman for his group he reports the highlights of its progress and problems to the whole assembly. He may make suggestions and recommendations. Sometimes, to save time, the recorders may prepare a collective report to be delivered by one of them.

If a number of groups are considering the same or related problems they may want to share the information assembled up to any one point in their progress. The recorders can meet informally and report back to their own groups. Or the recorders may meet as a special group—as may the group leaders and observers—to discuss their own work and the viewpoints and experiences of the others, and obtain aid from staff representatives.

Just as the whole conference uses a kick-off session, so can each group meeting. The recorder can prepare a summary of the previous meetings so that members have clearly in mind where they left off and where they will begin. The work of the recorders also forms the basis for the final report of the conference. ◇ ◇

## REHEARSAL FOR LEADERSHIP

**T**HE basic unit of production in the work conference is the small work group. The conference may aim to produce new insights and skills in its members, action recommendations for the sponsoring organization or the wider community, or a document for distribution beyond the conference membership. But, whatever the product sought, the basic unit of production is the work group.

The ideal aim of each work group is to weave the relevant thinking and experience of each of its members into its final product. In the short time span of a conference, work groups will need various kinds of help in achieving this aim. Probably the single most important of the helps a conference can provide is a well-selected and well-prepared leadership team for each work group.

No single formula for composing the leadership team applies to all conferences. Two positions are almost certain to be on the team—the discussion leader and the recorder (or secretary). In other conferences, other positions are built in—an observer who studies the processes of the group as it works and helps the group to think through improvements in its ways of working, and resource persons who have specialized knowledge or experience relevant to the problems which the group is trying to solve.

No matter how the planning committee decides to compose the leadership teams for any conference, two principles of efficient team operation can be stated confidently. 1) Each team member should understand the responsibilities of his special task and be able to carry them out effectively. 2) The leadership team for each group should plan in advance how they are to work together to help their group do the best job of thinking and production of which it is capable.

These principles have led conference planners to give increasing attention to the preparation and briefing of the service personnel for work groups. Some planners

find it valuable to bring all leadership together immediately before the conference as a part of this preparation.

Other conference planners feel that, if they select the right person to carry out each leadership job, no special briefing or pre-conference preparation is necessary. Certainly, selection is important. And it is conceivable that, if experienced and successful personnel can be found for all leadership positions, the first principle might be satisfied without special pre-conference training. Usually such happy selection is not possible in most organizations, particularly when they are new in the work conference game or when they are trying to give leadership experience to inexperienced personnel as part of a program of growth for members. And it is hard to see how the second principle, developing teamwork among the service persons assigned to each group, can be accomplished at all without getting the teams together as teams before they meet their groups for the first time.

If the value of a pre-conference rehearsal for leadership is granted, how can it be done? Here is a description of the procedures used in one recent work conference.

The preparation of work group leaders—chairmen, recorders, observers and resource persons—began at the time they were invited to serve. The letter which went to



*"And now if the audience will divide up into small groups—"*

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them included essential facts about the conference, including its aims, the problem areas assigned to different groups, and the plan of work group sessions in the overall conference schedule. In addition, the general duties of the leadership position which the person was invited to fill were described. Each person was asked to give his first, second and third choices of the work groups in which he would like to work.

Each person, as he accepted, was sent a brief outline of the duties of his position, along with a similar outline for each of the other positions on the leadership team. (The job sheet for recorders is reproduced on the next page.) He was asked to study these before the conference and to come to a 9 o'clock session on the opening day of the conference for further planning and briefing relative to his leadership in the conference. The conference in this case was to last  $2\frac{1}{2}$  days, the opening general session beginning at 1:30 P.M. This schedule left the morning open for leadership preparation. (To take care of drop-outs a few extras were recruited.)

This is the way the morning session of leadership preparation was organized.

*9 A.M.* The training session opened with a talk by the conference chairman, who was also serving as training coordinator. He explained the goals of the conference and how it had been planned to operate in order to achieve these goals. He illustrated his remarks with a diagram of the conference structure and a time schedule of meetings and other activities for the  $2\frac{1}{2}$  days. He described the teamwork which he hoped the discussion leaders, recorders, observers and resource persons would achieve in helping every group to do its best work. After questions, he introduced the four people who had been asked to serve as coaches for each of the positions on the leadership team.

*9:30 A.M.* Each of the four groups went to a nearby room. In each group, the coach served as a discussion leader as the group discussed problems growing out of the job sheet which had been sent them in advance. Of the several problems suggested at the beginning of the meeting, they discussed those first which members of the group agreed gave them most concern.

*10 A.M.* All four groups reassembled for a practice

session. The practice session was designed to simulate the first meeting of one of the conference work groups. One of the chairmen tried his hand at leading the discussion. The other chairmen took the parts of delegates in the simulated work group. One of the observers sat in with the practice group as its observer. The other observers sat outside the group, practicing observing but not commenting to the group during its session. One recorder sat in with the group as its recorder. The others sat outside the group practicing recording. Similarly, for the resource persons.

The practice meeting got underway and went on for twenty minutes. It terminated with a summary by the recorder and comments by the observer. The members of the group discussed the observer's remarks and decided how their group operation might have been improved.

*10:30 A.M.* After the scene was cut, there was general discussion of the roles of leader, observer, recorder, and resource person and of the team work they had achieved.

*11:00 A.M.* The four groups went to their respective rooms to compare notes on the practice meeting: how it went, how they felt about the way their job was performed, how they would do it differently when they met with their real conference group, etc.

*11:30 A.M.* All four groups reassembled and agreements were made about meetings of discussion leaders, recorders, observers and resource persons to be held during the next  $2\frac{1}{2}$  days of the conference. Next the leadership teams for each work group got together and went to the meeting place of their group to make plans for starting the afternoon session. Most of the teams continued to plan during the luncheon period.

When they were polled after the conference, all leadership teams were enthusiastic about the pre-conference training session. And the old hands were just as affirmative as the new. They seemed certain that the extra half-day spent in thinking through the problems of the conference, in becoming more familiar with the various leadership jobs, in rehearsing the opening of a work group and evaluating the rehearsal, and in team planning for each group paid off well.      ◇ ◇

## JOB SHEET FOR

Try to look at yourself as a member of the group—one with no more authority or prestige than the others, but with a special function of helping all members to do what they as a group decide they most want to do. Your primary job is to help the members select the problems which they wish to discuss and go as far toward solving these problems as they can in time available. This of course requires judgment by you from time to time as to how best to move the group forward and as to whether this can be done best by you or by some other member of the group, not forgetting your observer, recorders and resource persons as parts of the leadership team.

The following suggestions may help:

1. Meet with the other members of your leadership team before the first meeting of the group to agree on the general duties of each member of the team and to decide how you are to open the meeting—introductions, etc.
2. You may want to start the discussion by asking members to state their priority problems, writing these on the blackboard as they are stated.
3. Too long a list of problems can be more discouraging than helpful. So your next step may be to try, with the help of the other members, to boil down the list, especially those problems that overlap.
4. It is then up to the group to decide which of the redefined problems they wish to start with and how many they want to try to cover in time available. Help them to be realistic about how much they can do in a limited time.
5. As discussion goes on, differences of opinion will occur among the members. Such conflict is good if the members can discuss their differences objectively and reach as much considered agreement as possible. You can help by trying to state the differences clearly, by recognizing the contributions of each side impartially, and by attempting to find ways for each side to consider the strengths as well as weaknesses of the opposing position. Don't try to force consensus.

## DISCUSSION LEADERS

6. If the group bogs down, you may wish to ask the observer if he has any hunches on what the trouble is and how the group might get out of its difficulty. It is up to the members to decide whether or not they wish to accept the observer's suggestions.
7. From time to time a group may wander from its agreed plan. It is up to you (or the observer) to remind them that they have wandered and to ask them whether they want to return to their original goal. They may prefer the new track but, if so, they should realize that they are, in effect, making a new plan.
8. A group needs a summary of its thinking from time to time: when there is some confusion as to where they are, when they have finished one problem and are ready to move on to another, at the end of the meeting, etc. You may want to ask your recorder to summarize briefly at such times and ask the members to correct or supplement the summary.
9. If a need occurs for information with which the resource person is well supplied, ask for a contribution from him. If the needed resource person is elsewhere in the conference, send for him. If he can't come at the time, and the group feels they need his help, consider the possibility of deferring the point under discussion until he can come.
10. It is up to you to remind the group at intervals of the time limits within which they are working. Try to do this in such a way as to encourage them to keep on the beam, not in such a way as to make them anxious and strained.
11. Try to get contributions from as many members as possible; try to prevent a few members from monopolizing the discussion.
12. Remember that the conclusions of the members as a whole are probably wiser, if they've had a chance to think about the problems than the conclusions of any one member—including yourself.

## **JOB SHEET FOR RECORDERS**

As recorder your job is quite different from the stenographer's who takes word-for-word notes. It is also different from the old-fashioned secretary's who recorded only motions, seconds, amendments and votes. Your job is, first of all, creative listening to all that is said. Then you will record the main points from what you hear and organize these for use by your work group and, more selectively, for use by the whole conference.

Here are some suggestions about your job:

1. Keep track of such points as the following:
  - a. Points on which members agree or on which formal action is taken.
  - b. Points on which there are differences of opinion among the members.
  - c. Points on which you are not sure how the members feel.
  - d. Points mentioned but not discussed fully, which the group may wish to consider later.
2. Report to the group what was discussed and concluded rather than merely the general topics of the discussion.
3. Be ready to make an up-to-this-point report of group thinking at any time, and to make an inclusive report at the end of the meeting.
4. Ask the other members to amend your reports and invite their suggestions for improvement.
5. Don't feel obligated to report every point made or every member's contribution. In fact, it is probably best not to try to attach names to what was said except when you fear that otherwise a disagreement or minority view may be lost sight of.
6. You are responsible for the preparation of resolutions which your group may wish to communicate to the conference unless this responsibility is assigned by the group to someone else.
7. If the conference staff decides to communicate the conclusions of each work group to the entire conference periodically in general sessions or in a newsletter, you will have the duty of summarizing your group's conclusions for this purpose and perhaps also the duty to actually making the report, either orally or in writing. You will also have the duty of typing the reports from your group into the final written report of the conference if such a report is prepared.

## JOB SHEET FOR OBSERVERS

The observer is a member of the group who takes responsibility during the meeting for watching how the group is working and for interpreting what he sees to the group: whether participation is general or lopsided; how far the group progresses toward its goal, etc. Here are a few suggestions for you if you're a group observer:

1. Watch what happens, particularly the things that seem to help the group in what it is trying to do and the things that seem to hinder it.
2. Jot down your observations so you won't forget them. You may be given a form on which to do this.
3. When you are asked for a report, don't make a speech. Mention only a few of the things you noted, the ones you think are most likely to help the group work better.
4. Don't try to tell the members what they should have done. Point out what was done, as you saw it, and ask if anyone can think of something that might have been more helpful.
5. Phrase your comments so as not to give offense. Use "we" as much as possible. Ask questions, for example: "Was there anything we might have done at that point to move us ahead?" "Can anybody figure out why we took that particular line at that time?"
6. The observer's report is usually called for at the end of the meeting. But if the discussion bogs down and the group seems to need help in getting started, the observer may make a suggestion.
7. If the conference staff decides to ask members of the group to fill out an anonymous reaction sheet after each meeting of your work group in order to get members' ideas about how things are going and how to improve, it will be your job to pass these sheets out at the end of each meeting of your group, to ask the members to fill them out, to collect them, and to tabulate the results for your group.
8. The leadership team of your group—the discussion leader, recorder and yourself—should decide whether to share the tabulation of member reactions and suggestions with the whole group. Sometimes this is done at the beginning of the next meeting and becomes a basis for the group's deciding what changes, if any, they wish to make in their procedures.

## **JOB SHEET FOR RESOURCE PEOPLE**

Your primary duty is to contribute relevant facts, points of view and experiences to the group discussion when and as they are needed. Your views should be stated as contributions to the discussion, rather than as final wisdom about which there should be no debate. As a general rule, you should contribute only when requested to do so by the leader or other members. You should break this rule only when you are confident that your contributions will move the group ahead.

It follows from what has been said above that the group has some responsibility to use you properly. It is up to the chairman to let the group know the kinds of help you can give, and up to him and the other members to turn to you when such help is needed. If you are assigned to one group throughout the conference, it is easier for that group to use your help productively. If you are floating from one group to another, it may be wise for a given group to try to make an appointment with you when it can foresee a need for you, and to prepare rather specific questions in advance for you to respond to. A group can also use you helpfully at the close of a discussion, to supplement the results of their discussion and to suggest further steps for them to take discussing or in applying their conclusions in action.◇◇

# INTRODUCING THE AEA

The AEA (Adult Education Association of the United States of America) is a non-profit organization founded in May, 1951, as an instrument for developing a united adult education movement. The general purposes of AEA, as stated in its Constitution, are:

- “To further the concept of adult education as a process continuing throughout life.
- “To promote and develop adult education in the United States by affording opportunities to professional and non-professional adult educators to increase their competence and by encouraging and assisting organizations and agencies . . . to develop adult education activities and to work together in the interests of adult education.
- “To receive and disseminate information about adult education.
- “To promote the balanced development of educational services for adult persons in the United States.
- “To cooperate with adult education agencies internationally.”

United in the AEA to further these purposes through a program including field services, conferences, publications, and public relations, are over 12,000 men and women who work with adults in formal and informal educational and training programs. These leaders represent every sector of American society—education, labor, agriculture, industry, religion, social welfare, government service, and a host of voluntary associations.

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